

T³: Trustee Training Tips

Number 2 Volume 4

Kentucky Department for Libraries & Archives

Winter 2001

TAKING CARE OF BUSINESS

When you first joined the library board, you probably had little more to keep up with than the current month's board meeting packet and, maybe, your trusty *Kentucky Public Library Trustee Manual*. However, that blissful, uncluttered state probably didn't last long. Soon you added several month's worth of board meeting packets, a long-range plan, a set of policies, the latest Annual Report, the library's by-laws, perhaps some job descriptions, library policies pending revision, information on proposed library standards. The list goes on and on and seems to grow like kudzu on a warm summer night.

So, what's an organized trustee supposed to do? There are several possible solutions to taming the paper chaos, but one that seems to work for a significant number of board members is the plain old 3-ring binder. If your entire board isn't already using this low tech device, now may be the time to start. Ask your library director to provide binders (let's be brutally honest and admit that we need at least a 2½-inch spine) and to set them up for you. A typical binder has 12 monthly dividers for each meeting's packet, and either dividers or pockets to contain:

- the latest Annual Report
- the most current Long-Range Plan
- the current budget
- the library's by-laws or constitution
- the library board policies (not library policies)
- the 12-month agenda for the current year
- the instrument used for the library director's evaluation
- the library's official director's job description
- and anything else you or your director think important.

Two other considerations are a first page with the library's vision/mission statement, and a list of all board members' mailing addresses, phone numbers, and e-mail addresses.

Finally comes the decision of where to keep the binder. Some libraries provide space in the room where the board meets and individual members pick up their binders at the beginning of each meeting. The biggest advantage of this method is the opportunity it affords the director to add information to the binder as appropriate. The biggest disadvantage is that the trustee and all his/her information about the library are separated except at meeting time. Keeping the binder with the trustee does require the board member remembering to bring it each time and keeping it updated, but the trade off seems minimal when compared to the advantages of having the information at your fingertips when you need it.

THE POLITICAL TRUSTEE

Each and every public library trustee has political power—it's the people you know. By your appointment to the library board, you represent the public in your library's service area. That in itself gives you a certain amount of political clout.

Your political clout increases if you:

- Know public office holders, behind-the-scenes political party people, or big contributors to campaigns or, obviously, if you are a major contributor yourself.
- Are active in other community organizations—the more the better.
- Work in a profession that carries some weight with elected officials.

Library trustees should *build* relationships with their state representatives and senators and not just call them or visit only when you want something. You want them to know you represent your library in more ways than just asking for increases in state funding prior to the next session. In between budgets a trustee should communicate with his or her legislator whenever there is some statewide issue under consideration that could impact libraries and their customers.

A lot of times a state legislator might not be aware of an unintended effect of a bill. Never assume that anyone else will inform them. If there is time you should bring it up at a board meeting to see if the other trustees would like to join you in taking a position on a proposal.

Library trustees should try to visit their lawmakers while the legislature is in session. Preparing for such a visit provides trustees with a good background on the current library issues. And it's a great opportunity to educate the legislators about your library's strengths as well as its needs. Al-

ways express your appreciation for what they have done for your library.

If Frankfort visits aren't possible, the library can host its own event. Invite your legislators to meet with your board on a day convenient to the official's schedule. Consider hosting a breakfast, brunch, or evening dessert if you wish to include local library supporters as well. Sometimes such local events can be more productive, as you often will have more time to talk with the official. The official also will be able to see for him/herself the programs that were made possible by state dollars.

If you are meeting the legislator for the first time, provide a quick summary of your professional and volunteer backgrounds. If you sense the person is under a time crunch that day, you should state your points as quickly as possible. That could pay big dividends the next time you meet with that particular official.

Another goal of a first meeting is to find out which mode of communication (mail, fax, e-mail, phone, or face-to-face meetings) the legislator prefers.

Always encourage the official to call you if he or she needs a resource of information on library issues. If you know the issue well enough to provide an immediate response, do so. Otherwise say you will return the call as quickly as you can, then call the library director to help formulate the response, and get back to the official later that day or within 24 hours at the latest.

If your legislator does not end up voting the way your library had wanted, take time to write a note expressing appreciation for his or her time and consideration of your library's position.

--Adapted from Focus on Trustees
by David Miller, Ohio Library Trustee Association

AN EFFECTIVE BOARD

Everyone wants to be part of an effective library board, but not everyone knows exactly what makes a good board. Here are some measures by which to evaluate yourselves.

- ☐ Take seriously the business of selecting new library board members
- ☐ Involve all trustees fully in the business of the board
- ☐ Educate all members through the KDLA regional office's New Trustee Orientation, the KDLA sponsored annual Trustee Institute, trustee focused programs at KLA, PLS, and KLTA conferences each year, and regional workshops for trustees
- ☐ Educate new members, and provide refresher training to seasoned trustees, with a local orientation annually
- ☐ Prepare, with the director, the board meeting agenda carefully and distribute it to members in advance of the meeting
- ☐ Provide public notice of all library board meetings
- ☐ Ensure that the library director is present at all library board meetings (except when his or her salary is being discussed)
- ☐ Ensure that all trustees understand the library's budget and financial reports
- ☐ Work as a team
- ☐ Rotate the leadership of the board (officers are elected every 2 years)
- ☐ Review all library policies on a regular basis
- ☐ Review library *board* policies on a regular basis
- ☐ Review and revise, as needed, the library's long-range plan on a regular basis

- ☐ Communicate regularly with your public
- ☐ Get to know the library staff and the services of the library
- ☐ Visit the library regularly as a library customer
- ☐ Be willing to commit sufficient time to your job as a community representative
- ☐ Replace indifferent board members with people who seriously care about the library and put its interests first
- ☐ Talk about the library wherever you go
- ☐ Listen to what people are saying about the library wherever you go
- ☐ Develop an annual plan, in a form like the 12-Month Agenda (see *T³* Summer 2001), for the work of the library board
- ☐ Take advantage of all opportunities to talk with other library trustees on other library boards—share your experiences, difficulties, and successes
- ☐ Evaluate the effectiveness of the board on a regular basis.

T³:Trustee Training Tips is published quarterly by the Field Services Division of the Kentucky Department for Libraries and Archives. Correspondence should be addressed to the editor, Nelda Moore, at Lincoln Trail Regional Office, 201 West Dixie Avenue, Elizabethtown 42701-1533. Phone 270.766.5222; Fax 270.766.5223; e-mail: Nelda.Moore@kdla.net.

Serving Kentucky's Need to Know



An agency of the Education, Arts & Humanities Cabinet

LIBRARY LETTERS

*Dear Marian Librarian,
I thought I was doing the “right” thing by visiting
the library and getting to know the staff, but another trustee told me we weren’t supposed to talk
to staff. Can this be right?*

-- Troubled Trustee

Dear Troubled,
It sounds like your colleague on the board meant well but misunderstood the purpose of any prohibition about fraternizing with staff. This is to prevent staff from going over the director’s head to trustees with complaints. Trustees should *never* encourage this behavior and should absolutely refuse to discuss workplace issues with staff. That does not mean, however, that you can’t talk to staff and get to know them. Just remember they aren’t the boards’ employees, but the director’s. Don’t try to micro-manage his /her personnel.

HOW MUCH DO YOU KNOW?

The following quiz will let you test your knowledge on the topics covered in this publication. The answers are under “Publications” on KDLA’s web page <www.kdla.net>.

1. If we keep all our library board materials in a three-ring binder, where should we keep it?
2. When is a good time to contact our legislators? What method should we use?
3. How do we “officially” react, as a board, to a legislator that has voted against an important piece of legislation?
4. What are three ways we can educate new board members about their jobs as trustees?
5. Is it OK to discuss common interests, like gardening or fishing, with library staff when the director is not present?

**Kentucky Department for Libraries
and Archives
201 West Dixie Avenue
Elizabethtown KY 42701-1533**

**ADDRESS CORRECTION REQUESTED
PLEASE FORWARD**

ANSWERS TO T³ QUIZ:

1. If we keep our library board materials in a 3-ring binder, where should we keep it? [page 1]

That is up to each board. If you leave it at the library, you won't have to remember to bring it with you to meetings and you won't have to "stuff" it yourself with the upcoming meeting's packet. Your director won't have to remember to mail the upcoming meeting packet to you either. But, you need to weigh these considerations against the possibly more valuable one of having your library information available to you (at your fingertips) whenever you need it. If you keep your binder at home or office, and your director sends you information a few days ahead of the meeting, then you'll have time to think about the issues that will be discussed. Your editor recommends the latter and adds the optimistic hope that you'll also find time now and again to study some of the material about trusteeship.

2. When is a good time to contact our legislators? What method should we use? [page 2]

Scheduling a visit in Frankfort is a nice touch, but it is often more effective to host an event at the library itself. Set up a breakfast, brunch or after dinner dessert, invite all your legislators, invite your supporters (patrons, Friends, etc.), and tell your library story right there in the library—a show and tell! Don't forget the local media; legislators love the "free" publicity and most newspapers like the photo op as well. As to method, ask his/her office and then use whatever method he/she prefers.

3. How do we "officially" react, as a board, to a legislator that has voted against an important piece of legislation? [page 2]

You still say "thank you" and you do it in writing—snail mail or e-mail, depending upon the preference you've already learned. What you are thanking him/her for is listening to you. Be gracious. Remember you can catch more flies with honey than vinegar.

4. What are 3 ways we can educate new board members about their jobs as trustees? [page 3]

There are more than three, so take your pick from this list: (1) New Trustee Orientation provided by your regional librarian; (2) the annual Trustee Institute; (3-5) trustee focused programs at KLA, PLS, and/or KLTA; (6) regional workshops for trustees; (7) trustee orientations provided by the director and sitting trustees. (Not mentioned in this article, but also educational tools are T3: Trustee Training Tips, the Kentucky Public Library Newsletter, and any board development topics your regional librarian may bring to meetings.

5. Is it OK to discuss common interests, like gardening or fishing, with library staff when the director is not present? [page 4]

Yes, of course. And the director's presence is never a consideration in any discussion trustees might have with staff. What trustees don't want to do is discuss personnel issues with staff. If asked, the proper response is to politely refer the staff member to his/her supervisor—which in small libraries is usually the director. Employees of the director should never feel they can go over his/her head and seek redress from the board. Also, individual trustees are not empowered to speak for the board; the board only has a voice as a board meeting in open session with a quorum present.